PURCHASING GUIDELINES

FOR THE

CITY OF SAN ANTONIO

OVERVIEW

- Overview
- Mission Statement
- Laws & Ordinances
- Commodity Class
- Procurement Process
- Advertising Methods
- Purchasing Cycle

MISSION STATEMENT

To provide procurement services to City Departments in accordance with Federal, State, Local laws and ordinances and increase business opportunities for Small, Minority and Women owned businesses.

LAW & ORDINANCES

- State Law
  - Local Government Code
    - **Chapters 252, 271, & 2254**
- Local Ordinances
  - 77758, 82743, 93519, & 93760
- Administrative Directive 1.6
  - **Established January 4, 1982**
  - **Revised October 1, 2007**

COMMODITY CLASS

- Products (Materials and Consumables):
  - Computers, flooring, vehicles, medical supplies, furniture, automotive supplies, lighting products, plumbing supplies, construction materials, tools, safety equipment and supplies, etc.
- Non-Professional Services
  - Mowing Services
  - Janitorial Services
  - Construction Services
  - Hardware and software maintenance & support
  - HVAC Maintenance Services
  - Elevator Maintenance Services
  - Security Services

PROCUREMENT PROCESS

- Determine Need/Requirements
- Procurement methods
- Dollar Limit Categories
- Purchase Cycle

DETERMINE NEED

- Department recognizes need to purchase an item or service.
- Develop specification based on need
- Research solutions and costs
- Estimate “QUANTITIES”
- One time purchase
  - Continuous purchases (Annual Contract)
- Gather supporting information

PROCUREMENT METHODS

- Purchasing Card (PCard)
- Exemption from Competitive Bid
- Sole Source
- Request for Quotation (RFQ)
- Invitation for Bid (IFB)
- Best Value Bid (BVB)
- Request for Sealed Proposal (RFP)
- Cooperative Purchase Program

ADVERTISING METHODS

- **www.sanantonio.gov-** City Bidding & Contract Opportunities (Open Solicitations)-No fee
- **www.demandstar.com-** There are fees associated with using this website.
- **Channel 21**-Government Access Channel on Time Warner Cable
- **Local newspaper advertisements**

PURCHASING CARD (P-Card)

- The purchasing card is utilized for non-contract or non-inventory items.
  - Card may **NOT** be used for:
    - Materials and Services under an existing annual contract
    - Transportation (commuter/public)
    - Professional Services
    - Restaurants
    - Travel – Hotel or Airfare

DOLLAR LIMIT CATEGORIES

- Under $3,000.00
- Over $3,000.00 and less than $50,000.00
- $50,000.00 or more

DOLLAR LIMIT CATEGORIES (Cont.)

- **Over $3,000.00 and less than $50,000.00**
  - Request for Quotation (RFQ)
  - Request for Offer (RFO)
    - Sole Source
  - Informal Invitation for Bid (IFB - Annual Contract)
  - Cooperative Purchase Program (CO-OP)

- **$50,000.00 or more**
  - Invitation for Bid (IFB)
  - Request for Offer (RFO)
    - Sole Source
  - Best Value Bid (BVB)
  - Request for Sealed Proposal (RFP)
  - Cooperative Purchase Program (CO-OP)

PURCHASING CYCLE

- Requisition – by Department
- IFB, Best Value, & RFP's (solicitation) – by Purchasing
- Evaluation (RFP & IFBV) - Committee
- Recommendation – by Department
- Council (formal only) - Purchasing/Department
- Award notification – by Purchasing/Department
- Purchase Order – by Purchasing/Department